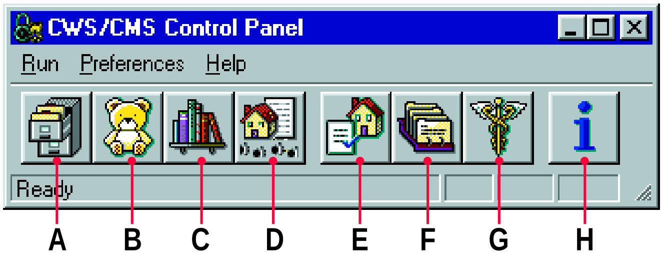
CWS/CMS Quick Reference Guide
Supervisor/Manager

County Help Desk Phone #:

Boulder Help Desk Phone #:

CWS/CMS
v5.2

CWS/CMS Control Panel



- A. Caseload
- B. Client Services
- C. Resource Management
- D. SOC 158
- E. LIS
- F. CDS
- G. MEDS
- H. System Information

How do I...

Caseload Application

View the Caseloads and Staff Persons in the Assignment Unit that I supervise?

- Use the Supervisor notebook (Summary page).

View information about referrals and cases in a specific caseload?

- Use the Caseload notebook (Summary page).

Find out what Requested Actions (Approvals) have been sent to me?

- Use the Supervisor notebook (Requested Actions page) or the Caseload notebook (Approval Actions page).

Transfer and assign Referrals and Cases?

- To transfer a Primary or Secondary assignment, use the Transfer Assignment command in the Action menu.
- To create a Secondary or Read Only assignment, use the Make Assignment command in the Action menu.

View the Reminders in a caseload?

- Click on the Caseload notebook, and retrieve the caseload you want.
- Click on the Reminder notebook, click the Filter button. Specify the desired time frame and type of reminder.

  Note: You can view a reminder only in the caseload of the staff person who has the Primary assignment in a referral or case.
- If you would like to view overdue reminders, click the Filter button then select the Overdue button.

Print Caseload Reports?

- Select the Print Report command in the File menu.
- Select Caseload Reports as the Area of Interest and a Report name in the Print Report dialog box; click the Print button.
- Select the caseload; click the OK button
- Define the dates and other options made available in the dialog boxes for the report you have selected; click the OK button.

Client Services Application

Create a Case without a Referral?

- Search for the child who will be the case focus child.
- Click on the + under the Open Existing Case Folder icon.
- If the child is listed in your search results, select the child and click the OK button. If the child is not listed in your search results, click the New button and complete the Client notebook for the case focus child.
- Complete all mandatory fields, e.g., Intervention Reason, Case Status, and Service Component.
- Create a Primary assignment for the case; edit the Start Date field, if necessary.
- Save to the database.

  Note: You can not create a Primary assignment for an incoming ICPC case.

Re-Open a closed Referral?

- In the Client Disposition box, delete the closure reason by selecting “None” in the Closure Reason field.

  Note: A closure reason can’t be changed if the client is in an open case or open placement.
- Save to the database.

Re-Open a closed Case?

- Search for the case focus child, then bring the associated closed case into current work. The closed case will be Read Only.
- Click the History button on the Assignment page of the Case Information notebook.
- Copy the Closure Statement from the Closure Summary page.
- Select the Reopen Closed Case command in the Action menu.
- With the case reopened, change the Primary assignment, if necessary, and paste the Closure Statement into Case Notes.
- Save to the database.

Client Services Application (continued)

Limit Access to Referral or Case?

- With the Referral or Case in focus, select the Limit Access command in the Action menu.
- Select the Sensitive or Sealed radio button, then save to the database.

  Note: You must have Limited Access privilege.

Change an AAP payment amount after the Adoption Assistance Agreement date has been entered?

- Open the AAP Agreements page of the Adoptive Placement notebook, highlight the appropriate payment row in the grid, and make required changes.

  Note: Only a supervisor may modify an AAP agreement after the Adoption Assistance Agreement date has been entered into the Signed Date field and saved to the database.

Change an Allegation Conclusion?

- Open the Conclusion page of the Allegation notebook, and select the Edit Allegation Conclusion command in the Action menu. Make a new selection in the Allegation Conclusion.
- Make an entry in the Conclusion Description text field.
- Save to the database.

  Note: This action may affect reminders in the referral, e.g., Cross Report for Law Enforcement Due.

Print Program Management Reports?

- Select the Print Report command in the File menu.
- Select an Area of Interest and a Report name in the Print Report dialog box; click the Print button.
- Select the time period and level you want in the Program Management dialog box; click on the OK button.

  Note: You must have Program Management Report privilege.

Create and Remove a Reminder in a Referral or Case?

- With the Referral or Case in focus, click the + under the Open Existing Reminder icon to create a reminder.
- To remove a user-created reminder, click on the Open Existing Reminder icon. Select the reminder in the dialog box. Click the Remove button.

Find out who made the last changes in a notebook?

- Bring the notebook into focus; put the cursor in the field for which you want to track the data.
- Select the View Audit command from the Edit menu.

Review the completion status of AFCARS fields?

- To view AFCARS fields in an open case, click on the Toolz menu or Toolz icon; select the AFCARS Navigation Tool radio button.
- To review a report of AFCARS fields in a group of cases, create the Program Management Report "Foster Care Data Analysis report (PMAFCARF)". It is located under Program Management Reports in the Case Area of Interest.

See the number of each type of notebook and document in a referral or case?

- Use the View Counts command in the Action menu.
- Note: Counts include only the notebooks and documents in current work (cache).

Approve actions and documents?

- **Referral Response** - With the Referral Info notebook in focus, select the Determine Response command from the Action menu.
- **Client Disposition** - With the Referral Info notebook in focus, select the Client Disposition command from the Action menu.

Approve actions and documents? (continued)

- **Case Plan** - With the Case Plan notebook in focus, select the Approval command from the Action menu.
- **Case Transfer** - With the Case Info notebook in focus, select the Approval command from the Action menu.
- **Court Report** - With the Court Report notebook in focus, select the Approval command from the Action menu.
- **Case Closure** - With the Case Info notebook in focus, select the End Case command from the Action menu.
- **Placement** - With the Placement notebook in focus, select the Approval command from the Action menu. In the dialog box, select the rows for the items you would like to approve (e.g., Placement and Ongoing Payment) by marking the Action checkboxes. Select the appropriate Approval Status, Date, and Time fields. After completing the approval rows. Click Apply if you would like to take multiple actions. Click the History button to view each item's approval history.

Resource Management Application

Assign Staff Authority?

- Retrieve the Office that contains the Assignment Unit that you supervise; open the Assignment Unit notebook.
- On the Staff Authority page, select a Staff Person, and then use the radio buttons in the Authority section to assign rights within the unit.
- Save to the database.

Reset a password?

- Open Staff Person notebook.
- On the Logon page, click on the current row in the Logon Information grid.
- Select the Reset Password command in the Action menu.
- Enter and confirm a new 6-8 character password in the Password dialog box, using no more than 3 consecutive characters from the old password.
- Save to the database.

Update a staff person's notebook?

- Click on the Open Existing Office icon, and then open the office that contains the Staff Person Notebook you want to update.
- Click on the Open Existing Staff Person icon, select the staff person, edit, and then save to the database.

Create a caseload?

- Click on the Open Existing Office icon, and open the office in which the new caseload will be created.
- Click on the Open Existing Assignment Unit icon; open the Assignment Unit in which the new caseload will be created.
- On the Caseload page, click on the + in the corner of the Caseload grid.

  Note: The new caseload is automatically assigned to the Unit Supervisor who can then reassign it to another staff person.

Reassign a caseload?

- Click on the Open Existing Office icon, then open the office where the caseload will be transferred.
- Click on the Open Existing Staff Person icon; open the Staff Person notebooks involved.
- From the Action menu, select the Reassign Caseload command.